2023 ACOSVO ANNUAL CONFERENCE

Where Leaders Dare

Wednesday 22nd November
9:30 - 16:30

St Paul's & St George's Church (Ps & Gs)
46 York Place
Edinburgh
EH1 3HP

LGT Wealth Management

#ACOSVOconf23

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For Scotland's Voluntary Sector Leaders

UPCOMING EVENTS

ACOSVO Cross Border Network: Have Your Say

7 December 2023, 12:30 - 13:15, online

Are you an ACOSVO member and a senior leader within an organisation which works across the UK? Then ACOSVO's Cross Border Network is for you! Join this lunchtime drop-in session to hear from your network peers, share current experiences of working in cross border charities, and tell us what you want to get out of this network.

Developing Your Leadership Style

7 December 2023, 14:00- 16:00, online

Do you know what the different leadership styles are and which one fits you best? Create space to reflect upon your preferred leadership style as it has evolved over time, with reference to some leadership theory including adaptative leadership, consider an approach to further strengthen and communicate that style both in person and in an online presence, and think about what you might do differently in the future.

The Well Balanced Chair programme - Robust Relationships: Your Board; Your Organisation

23 January 2024, 16:00 - 18:00, online

Join us for a masterclass that will examine the relationships between the Chair and the rest of the organisation, provide examples of good practice and delve into conflict management to ensure that you can navigate difficult conversations and keep relationships positive and productive.

CEO Check-In

29 January 2024, 15:00 - 16:30, online

A confidential and supportive space for chief executives to come together and discuss relevant issues and concerns as well as brainstorm solutions and ideas. The theme of this check-in will be set closer to the date to ensure we are encompassing current events.

Leadership and Board Exchange Information Session

8 February 2024, 12:30 - 13:30, online

A free online information session to learn everything you need to know about the programme. Previous participants will share their own exchange reflections and answer any questions you may have.

The Well Balanced Chair programme - Preparing Your Board for the Future: Succession Planning for Chairs

14 March 2024, 16:00 - 18:00, online

Succession is something that all organisations experience - it's a case of when, not if. Join ACOSVO and other voluntary sector Chairs & Vice Chairs to look at practical tips, approaches and resources to help develop and embed effective succession plans in your organisation.

WELCOME FROM ACOSVO'S CEO

A very warm welcome to your 2023 ACOSVO Annual Conference! I am delighted to be joining you all here today to chair this event and I want to thank you for taking the time out of your busy schedules to attend.

The challenges faced head-on by Scotland's charity leaders in today's climate are beyond words that I can articulate, but are felt by all of you and your teams. I hope that today gives you the opportunity to connect with peers, have some time to reflect and acknowledge the critical role that you have played in our communities - be proud of it.

This year we have decided to do a deep-dive into a topic which we know sector leaders need to be exploring but, with the current demand placed on the voluntary sector and the sheer amount of information out there, we do not have the time or capacity to explore. Digital tools, data, and artificial intelligence are game-changers, there is no doubt about that. But they also raise some important questions that need to be addressed by the leaders of the sector. What will the impact be on the communities we serve and how will it change the needs and challenges of our beneficiaries? Compassion, creativity, and culture are at the core of the Scottish voluntary sector, so how do we ensure this humanness is not lost?

While we at ACOSVO are in no way experts on the topic, we've invited several leaders of organisations who work in the digital, data and AI field to be here today. They will help provide some clarity on what you need to know, what opportunities there are and how we can adopt a more collaborative approach, not only in how we work with other sectors, but how we work with each other. What tools already exist to aid us and what is emerging that we might use to our benefit?

We will be starting the day with our keynote speaker, Rhodri Davies, Director of Why Philanthropy Matters, who will kick things off by looking at what the practical

WELCOME FROM ACOSVO'S CEO

implications of adopting new digital technologies and AI are - what are the pitfalls and risks we need to know about? Our first panel session will address the evolving landscape of technology adoption within the sector, exploring the opportunities and challenges, the larger ethical questions, and how we remain connected to our beneficiaries. The afternoon panel will look at how data, digital and AI can foster collaboration for the Scottish voluntary sector and what opportunities are available.

Thank you everyone who has made this day possible, in particular our main sponsor, LGT Wealth Management and our conference learning partner, Scottish Tech Army. Thanks also to all our speakers, panelists, discussion leads, and exhibitors; your insights, knowledge and contribution will support our learning, thinking and progression. I encourage you to go and speak to the exhibitors we have invited along and we are delighted to be joined by some of ACOSVO's Strategic Partners too.

This is your chance to dive deep, ask questions, share your experiences and hopefully come out energised, informed and I suspect with as many questions as answers! But let's not forget, we're not in this alone. Collaboration is key, and that's what makes events like this so special. It's a chance to connect and learn from one another. So, let's strike up those important conversations and keep them going long after the conference ends. Thank you for your support over the year - it is valued and appreciated and I am excited to see you all soon!

Lucinda Godfrey
ACOSVO'S CEO

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AGENDA

09:30	Registration and Networking
10:00	Hello & Welcome
10:10	AI & Charities: Opportunities and Challenges - Rhodri Davies, Director, Why Philanthrophy Matters
10:40	Morning Panel - Digital, AI, and the Scottish Voluntary Sector
11:40	Refreshment Break
12:00	'How (not) to lose friends and alienate people, with AI' - Julie Hutchison, Technical Director, Charities, LGT Wealth Management
12:30	ACOSVO AGM
13:00	Lunch
13:45	JP Morgan 'Tech for Social Good'
14:15	Discussion Spaces
15:15	Refreshment Break
15:30	Afternoon Panel - Collaboration: What's Possible?
16:20	Chair Reflection
16:30	Close

Investing for charities

Portfolios constructed with purpose

There is no typical charity, every single one is unique and we are committed to delivering a personalised service to match. At LGT, our charities team in Scotland will take the time to get to know your priorities and values, to develop a deep understanding of what your charity is looking to achieve and construct a portfolio that meets those objectives.

Contact lgt.charities@lgt.com or visit **www.lgtwm.com/charities**

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MORNING PANEL

Digital, AI, and the Scottish Voluntary Sector

This session addresses the evolving landscape of technology adoption within the Scottish charity sector. Our speakers will explore what the current Scottish landscape looks like with regards to artificial intelligence and digital; what leaders need to know, what the bigger, ethical questions are and how we remain connected to our beneficiaries as we adopt a more digital way of working.

CHAIR

KIRSTY MCINTOSH
Head of Partnerships
Scottish Tech Army

Kirsty is Head of Partnerships for the Scottish Tech Army, a not-for-profit that works with charities with digital challenges using an extensive network of skilled tech volunteers. She leads its engagement with the tech and third sectors, developing the partnerships needed to catalyse scalable social impact. A key responsibility is developing its UK wide initiative, the Tech for Good Alliance which provides a framework for skilled volunteering opportunities for tech and tech related corporates. She has seen first-hand what can be achieved when people and organisations come together to solve problems and is a passionate believer in the power of tech for good.

She is Chair of Seescape, an Ambassador for the Digital Poverty Alliance, and Patron of The Teapot Trust.

SPEAKERS

RHODRI DAVIES
Director
Why Philanthropy Matters

Rhodri is a well-known expert and commentator on philanthropy and civil society issues. He is the founder and Director of the think tank Why Philanthropy Matters and the host of the Philanthropisms podcast. He is also a Pears Research Fellow in the Centre for Philanthropy at the University of Kent, and Philanthropy Expert in Residence at the Pears Foundation.

Rhodri is the author of two books: What is Philanthropy For? (2023) and Public Good by Private Means: how philanthropy shapes Britain (2016). He was formerly Head of Policy at Charities Aid Foundation (CAF), where he also set up the in-house think tank "Giving Thought".

MORNING PANEL CONT.

Digital, AI, and the Scottish Voluntary Sector

JOHN FITZGERALD
Digital Evolution Manager
SCVO

John leads SCVO's digital evolution programme. He and his team have helped thousands of charities to make strategic use of digital to serve their communities and further their aims. Alongside bespoke one-to-one help and advice, they also provide in-depth guides such as their new guide to using AI responsibly.

DILRAJ SOKHI-WATSON
Director
Equate Scotland

Dilraj is the Director of Equate Scotland, a national policy, research and development organisation focusing on women's underrepresentation within the science, engineering, technology, and the built environment industries. She has worked in senior programme management, policy development and executive positions across a diverse range of not-for-profit organisations.

Dilraj brings cross sector experience in urban development with subject matter expertise on the themes of environment, poverty, and social capital (with a focus on gender mainstreaming).

Her core competencies are strategic planning and execution, evidence driven programme management, change management and fundraising. Dilraj is a member of Scotland's AI Alliance Leadership Group and Climate Emergency Skills Action Plan Implementation Steering Group, along with ongoing trustee responsibilities in local and international organisations. Dilraj's work has been always guided by her personal values - rights based and intersectional.

EMMA WHITELOCK
CEO
Lead Scotland

Emma has over 25 years of experience in the voluntary sector, working within organisations focused on equality of access and outcomes in learning, citizenship, volunteering and employment, working with disabled people, carers and families. Emma is currently the CEO at Lead Scotland, since 2015.

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LGT WEALTH

How (not) to lose friends and alienate people, with AI

This session looks at how to navigate the governance and policy issues of AI for your charity. What are the trust and reputation issues arising and how can they be effectively managed by your charity? With the AI tools which are becoming available, board and executive decision-making will be under the spotlight in new ways. How can you embark on this journey on the right footing? What are the governance and policy pitfalls to consider, as well as some of the opportunities?

JULIE HUTCHISON
Technical Director - Charities
LGT Wealth Management

Julie is the Technical Director for Charities with LGT Wealth Management, and a national policy expert in the field of charity governance. Julie graduated with a First in Law from the University of Edinburgh and specialised in private client work, including philanthropy and the creation of charities. Julie is a well-known sounding board for clients, including CEOs, drawing on her 20+ years of experience across law and finance as well as her cross-sector roles. Julie's client work often involves managing sensitive dialogue processes, and the facilitation of board discussions.

Julie's experience in the public sector stems from roles supporting OSCR, the Scottish Charity Regulator, and the NHS. In 2018, Julie was the project manager and co-author of OSCR's investment guidance for trustees. In 2019, Julie was asked by the Scottish Government to Chair the Review of Governance of NHS Endowment Funds, producing a report with recommendations to strengthen the governance of these grant making bodies. She is also a board member of SEPA, Scotland's Environment Protection Agency, and sits on its Audit and Risk Committee.

Julie's academic links include her role as a Visiting Professor in Governance and Innovation at Edinburgh Napier University.

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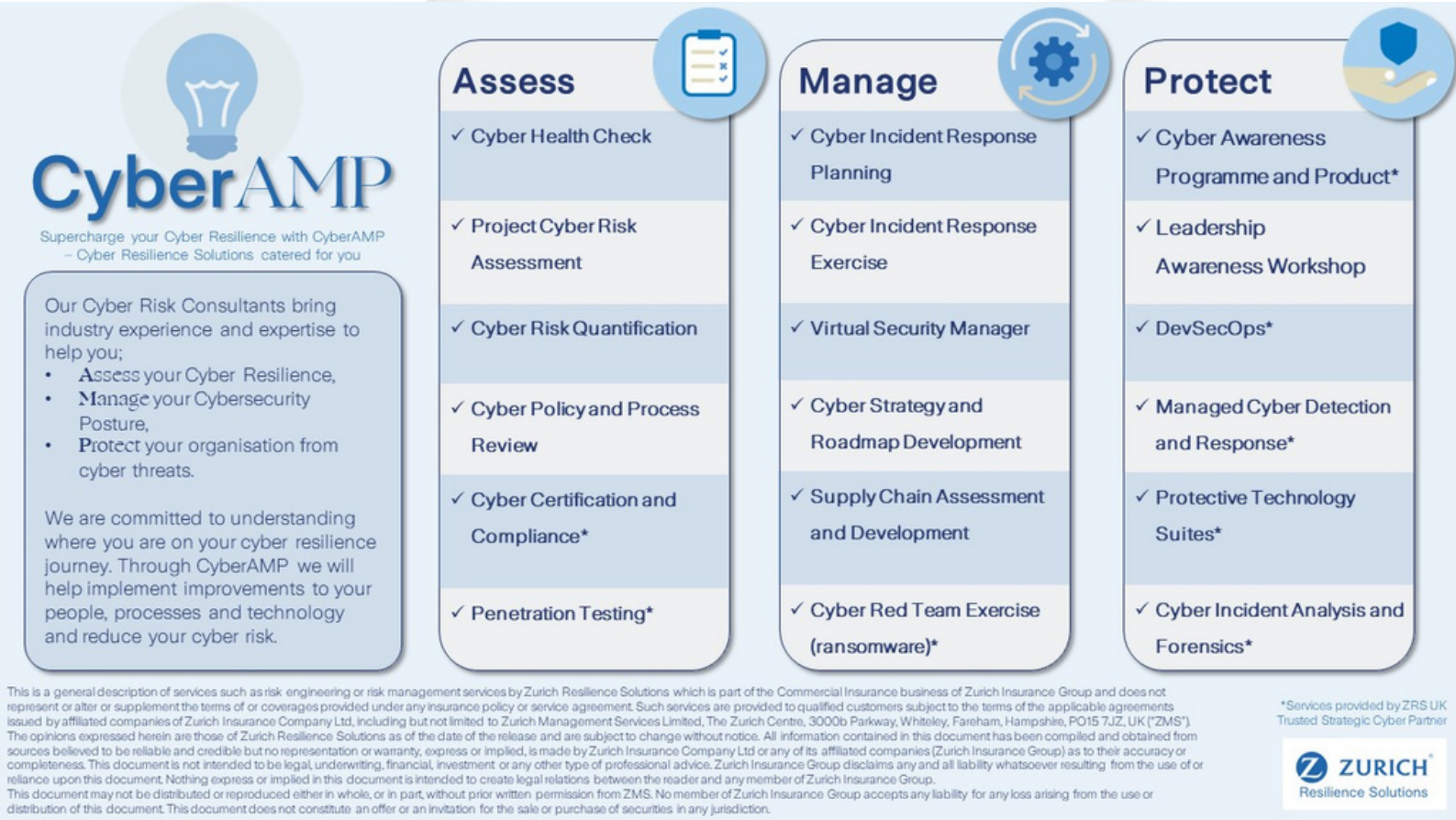
Tech for Social Good

"At JP Morgan's Tech for Social Good, we believe the success of our firm depends on the success of the communities we serve. We corral the passion, power and skills of our tech workforce for the social sector, our communities, customers, and clients. Through human-centered programs and a local focus, we help make the world a better place. We make an impact through programs that support ideation, solution delivery and education in the social good sector, empowering social good organisations to advance their mission through tech."



DISCUSSION SPACES

1. The Future of Work: Leading in a time of digital transformation

Dr Carol Jacklin-Jarvis, Open University's Centre for Voluntary Sector Leadership

In this workshop we will discuss the skills and mind-set required by Voluntary Sector leaders as they take their organisations through a digital transformation. We will look at how leaders can identify skills gaps within their organisations and gain confidence in introducing new ways of working.

2. AI for Charity: Exploring the Uses

Sheá Panayi , Cyber Risk Consultant, Zurich

The two letters 'AI' can be heard everywhere, we're all talking about it. Whether it's in work meetings and customer demands, or Hollywood movies and product adverts, we can all agree 'AI' being tossed around a lot.

We're being told to stay ahead of the curve. To incorporate AI wherever we can to improve processes. To consider all the ethical implications. However, before we do that, shouldn't we take a step back and define what we want to use AI for?

In this discussion we will be exploring the different use cases of AI for charities. The aim is to start from square one and discover, from charity leaders, which use cases would help and support the voluntary sector the most.

3. Culture, Demands, and Leadership

Sarah Griffiths, Leadership Coach & Facilitator

The role of a voluntary sector leader is not an easy one, the to-do list seems to be never-ending and with additional pressures around funding, recruitment, and capacity there is a significant amount of pressure on our shoulders. A positive workplace culture is an integral part of our organisational wellbeing, staff retention and developing our own strengths. In this hour we'll examine how do we not lose our positive and motivational culture (in fact how do we amplify it) whilst dealing with competing demands and the intense pressures placed on leaders.

4: What's Happening with the Workplace?

Lisa Gallagher, Director & Co-Founder, Flexibility Works

We have all moved to a new way of working where hybrid is the norm for many of us. But what does the flex landscape look like in Scotland now and how do we make this work well for our organisations? And what about our 'frontline' workers? Come along to this discussion-based workshop to hear the latest insights on flexible and new ways of working in Scotland and talk about your current challenges, as well as opportunities and solutions. Come willing to listen, share and support colleagues.

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Navigator wish all delegates a successful **Where Leaders Dare Conference**!

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GET THE MOST OUT OF YOUR ACOSVO MEMBERSHIP

By being an ACOSVO member you're part of an incredible community of over 750 voluntary sector Chief Executives and senior leaders across Scotland.

Your membership gives you access to:

- Our fantastic Leadership Exchange and Board Exchange programmes, Mentoring, and subsidised Interim Executive, Chief Executive & Senior Leader First Year in Post services.
- An exclusive and discounted programme of events, from workshops to check-ins, in-person and online.
- A range of dedicated network groups to connect with others in similar positions or with similar interests - Chairs Network Scotland, Women Leaders Network, Cross Border Network

To find out more about any of our events, services, networks or benefits, visit acosvo.org.uk or email office@acosvo.org.uk

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AFTERNOON PANEL

Collaboration: What's Possible?

This panel session will explore how data, digital and AI can foster collaboration for the Scottish voluntary sector. Our panellists will explore what the opportunities available to the sector are, the importance of connecting with others to fill the digital skills gap on boards and what makes effective collaboration.

CHAIR

RACHEL MAITLAND
CEO
MND Scotland

Rachel joined MND Scotland in July 2021 and is responsible for leading the overall strategic direction of MND Scotland and is accountable to the Board of Trustees. Working alongside the Executive Leadership team, she is responsible for driving forward their mission and ensuring everyone across the team is empowered to deliver their strategic aims.

Rachel is from a commercial background and has always specialised in roles where stakeholder engagement, relationship management and operational excellence have been central. She is passionate about building and developing empowered teams and actively supports continuous learning and development.

SPEAKERS

JOHN CAMPBELL
Digital Transformation Programme Director
Scottish Government

"I am a passionate digital transformationalist working with charities and companies of all sizes to consider and develop digital efficiencies. I aim to ensure a value gain from organisational process improvement with internal staff growth, adaptation and support.

Since joining the Scottish Government four years ago, I have been introducing a digital change culture into public sector organisations, implementing a framework for innovating and encouraging creative thinking.

As a Digital futurist, I help Charities plan and prepare for an inevitable future, considering and enabling them to realise benefits, reduce confusion and improve services. "

DANIEL KING
Professor
Nottingham Business School

Prior to joining Nottingham Trent University Daniel completed a PhD at the University of Manchester. The thesis was an ethnography of his practice as a manager of a small Voluntary and Community Organisation. Drawing on critical post-structural theory he critiqued his own practice as a manager, in particular examining the powerful manner in which he was disciplined and professionalized into being a Voluntary Sector Professional.

Daniel has worked and volunteered in the Voluntary Sector for a number of years, setting up and running small-scale charities and working in homelessness and mental health hostels. He is a co-Director of the Firebird Trust.

ROSS MCCULLOCH
Founder
Third Sector Lab

Ross McCulloch is Director of Third Sector Lab - a digital agency specialising in work with social enterprises, charities and housing associations.

Ross has over a decade of experience in tech for good and is a trustee of Parenting Across Scotland. Ross developed and run's SCVO's acclaimed Digital Senior Leaders Programme, which has supported over 250 charities since 2016. Ross was named one of Big Issue Magazine's Changemakers of the Year. Ross is also the founder of a range of sector-support programmes, including The Curve, Digital Trustees, The Open Working Programme and Tech for Good Scotland.

CELIA TENNANT
Chief Executive
Inspiring Scotland

Celia has been with Inspiring Scotland since its launch in 2008, as Head of Funds before taking on the role of Chief Executive in 2013.

Celia is a member of several community and advisory groups. She sits on the Tackling Child Poverty Programme Board and The Scottish Violence Reduction Governance Board, is a Board Member of Entrepreneurial Scotland and is an Advisor to Common Purpose Scotland.

Celia is an enthusiastic advocate of the power of sport to break down barriers and inspire people. She is a British Cycling coach in track, road and time-trial and founded the Clydesdale Colts youth cycling group, which she now Chairs. She is also a Trustee of the Winning Scotland Foundation.

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